

IP Inclusive Business plan 2023-25



In a move to streamline our work – and in line with our supporters’ suggestions – this year’s business plan covers two years, from August 2023 to July 2025. It is based on discussions at our 18 April 2023 annual meeting, input from the IP Inclusive Advisory Board¹, and ongoing consultations with our volunteers and other stakeholders. It builds on work done in the previous twelve months: see our 2022 Annual Report².

We will work with our supporters to establish and implement the operational details. Our communities, regional networks, Careers in Ideas task force and other networks and working groups will also coordinate their activities around the general themes below but will have greater independence to tailor their work for the specific groups and issues they represent.

We welcome feedback and suggestions from all our stakeholders. Please contact us via our Lead Executive Officer Andrea Brewster (abrewsteripinclusive@gmail.com), or write to contactipinclusive@gmail.com.

IP Inclusive Management
24 July 2023

¹ See <https://ipinclusive.org.uk/the-ip-inclusive-advisory-board/>

² See <https://ipinclusive.org.uk/newsandfeatures/our-2022-annual-report/>

The business plan

1 High-level objectives

From our Advisory Board, breakout discussions at our 18 April 2023 annual meeting, and other things supporters have been telling us over recent months, the following objectives have emerged as particularly important and will shape our plans for the next two years:

1. **Allyship**
 - Encouraging and empowering allies throughout the IP professions
2. **Inclusive hybrid working arrangements**
 - Encouraging and supporting inclusive, accessible hybrid working arrangements post-Covid
3. **In-person events and networking opportunities**
 - Improving opportunities for our supporters to build their personal and professional networks
4. **Support for early-career IP professionals**
 - Increasing support and networking opportunities for recent entrants to the IP professions
5. **Data gathering**
 - Gathering, and helping IP sector businesses to gather, data to assess EDI levels in the IP professions, IP Inclusive's impact, and areas in need of future work
6. **Diversifying the upstream pipeline**
 - Continuing, through Careers in Ideas³, our efforts to attract a more diverse pool of recruits and widen access to the IP professions

The move to a two-year business plan, along with an intention to establish longer-term strategic plans (see section 4 below), aligns with stakeholder suggestions; we believe it will increase our capacity to focus on and develop our objectives. We will, however, continue to budget annually (see 3.2 below) and will review progress on the current business plans each time we do.

Below, in section 2, are the specific things we plan to do in pursuit of the six high-level objectives above. There is overlap between them, and we anticipate progress in each being of value to the others. Building on our work in 2022 and 2023, the general theme of allyship (objective 1) will underpin our work in all areas – and as usual, our communities will be key to our efforts to reach, encourage and support their allies.

³ See <https://ipinclusive.org.uk/careers-in-ideas/>

As in previous years, we also plan to progress certain operational matters. These, listed in section 3, will equip us to deliver the business plan and to provide improved support for our volunteers.

Finally, section 4 sets out some longer-term plans, which we believe will place IP Inclusive in a stronger position to pursue its objectives for as long as the need exists.

We have also included:

- In Annex I, the things we hope to continue to do as part of our day-to-day activities. These will support the items in section 2.
- In Annex II, further “nice-to-have” items suggested by our Advisory Board and annual meeting attendees. These we will attempt to do in 2023-25, resources permitting, and otherwise keep in mind for future business plans. Some may be incorporated into the section 2 items.

2 Pursuing the high-level objectives

2.1 Allyship

Encouraging and empowering allies throughout the IP professions

This objective will underlie everything we do in 2023-25. IP Inclusive supporters are by definition allies; we want to celebrate that and at the same time to help them become more active, confident and better-informed allies for those in need of their support. As ever, we will strive to mobilise a wider range of allies, and to provide them with opportunities to encourage and inform one another.

We will involve our communities and support networks – both individually and together – in allyship-related projects. Their input will be vital in establishing, and promoting, what good allyship looks like. Together we plan to:

- Provide basic guidance on allyship in our EDI “starter pack” for new entrants to the IP professions (see 2.4 below)
- Use regional events (see 2.3 below) to provide insight and guidance on effective allyship
- Through these events, encourage and support the creation of allies’ pledges
- Organise an event to provide an allies’ guide to EDI-related discussions and inclusive language, with input from all the communities
- Reinstate IP Inclusive ally badges, lanyards and/or pledge cards for distribution to event attendees
- Continue to encourage the inclusion of allies in the communities’ events and their representation on the communities’ committees, and the provision of information and resources to help allies support the relevant groups

- Continue to encourage intersectional allyship through collaborations between our communities and support networks

2.2 Inclusive hybrid working arrangements

Encouraging and supporting inclusive, accessible hybrid working arrangements post-Covid

This topic seems to be at the forefront of many people’s minds. As working models evolve, it will be important to avoid discrimination against particular groups and/or negative effects on IP professionals’ wellbeing.

In order to help businesses establish more inclusive hybrid working models we plan to:

- Provide an event and follow-up resources on this topic, introducing perspectives from different IP sector businesses and ideally also from outside experts
 - Work with our communities and support networks to ensure these include input from, and support, groups for whom hybrid working might bring particular challenges (for example disabled people, parents and carers, early-career IP professionals, paralegals, business support professionals, those working in-house and/or in regional offices, and later-career workers)
- Work with Jonathan’s Voice to address the mental health implications of new working arrangements

2.3 In-person events and networking opportunities

Improving opportunities for our supporters to build their personal and professional networks

IP Inclusive also needs to evolve post-Covid. Our online events have in general improved accessibility and reach, and we believe it is important to retain that. But there is also a growing need for people to meet one another in-person again and to develop their support networks, both professional and personal. These valuable networks also facilitate the sharing of EDI-related ideas and in turn the adoption of best practices throughout the IP professions; they help us to involve a wider range of IP professionals in IP Inclusive’s work; and they will assist with objective (4): see 2.4 below.

Over the next two years we plan to:

- Provide a higher proportion of in-person and hybrid events with EDI-related themes
- Include networking opportunities in our events wherever possible, as well as some purely social events
- Wherever possible, continue to provide the training and awareness-raising content of our events in an online or hybrid format, and to record it as a resource available to all our supporters longer-term
- Run our 2024 and 2025 annual meetings in a hybrid format

An important part of this work will be improving our engagement with, and support for, IP professionals outside London. New, more flexible working arrangements may require IP Inclusive to adopt a different approach to engaging with the Charter signatories and individual professionals that the regional networks serve. We would like to work with all our supporters to shape that approach, and where possible to align it with our other high-level objectives.

We therefore plan to:

- Conduct a survey into IP professionals’ preferences for regional activities and support
- Based on the survey results:
 - Help the regional networks to identify and deliver new ways of engaging with their local supporters
 - Provide a higher proportion of general IP Inclusive events outside London (and/or events that can be repeated in more than one location), with both educational/awareness-raising content and networking opportunities
 - Where appropriate, work with CIPA, CITMA and other IP sector organisations to provide joint regional events and resources

2.4 Support for early-career IP professionals

Increasing support and networking opportunities for recent entrants to the IP professions, and encouraging their involvement in EDI issues

This work will largely be done in collaboration with our IP Futures community, and may also benefit from the involvement of our regional networks. We believe it will be valuable to Charter signatories of a range of types, in particular law firms or corporations with relatively small IP departments. We plan to:

- Provide more in-person networking opportunities for early-career IP professionals, including through our regional networks
- Share these opportunities with relevant IP sector groups such as the CIPA Informals, the Law Society’s Junior Lawyers Division, the Bar Council’s Young Barristers’ Committee and academic institutions offering IP-related qualifications
- Provide guidance and/or an event on early-career networking skills
- Create an EDI “starter pack” for entrants to the IP professions
- Work with the London Chapter of ChIPs⁴ to raise awareness of and promote the February 2022 amendments to the UK Patents Court Guide relating to the use of junior advocates to improve diversity of representation

⁴ See <https://chipsnetwork.org/chapter/united-kingdom/>

2.5 Data gathering

Gathering, and helping IP sector businesses to gather, data to assess EDI levels in the IP professions, IP Inclusive's impact, and areas in need of future work

There are potentially two strands to this work. Our Charter signatories need to gather and evaluate their own internal EDI data, often to comply with client requests and certainly to inform their EDI strategies. Equally, IP Inclusive needs data from across its support base, in order to assess its current impact and target its future work.

In addition to the data gathered on regional engagement (see 2.3 above), we plan to:

- Provide basic standards and guidelines for EDI data gathering in IP sector businesses
- In doing that, collaborate with relevant representative and regulatory bodies, and the UK IPO, to ensure a harmonised approach that can be followed with confidence and provide useful benchmarking data
- Re-run our 2019 sector-wide EDI survey
- Gather additional information about IP Inclusive's impact through consultation with our Charter signatories (see Annex I, section 2)
- Create an updated IP Inclusive impact report, based on the sector-wide survey and Charter signatory input

2.6 Diversifying the upstream pipeline

Continuing, through Careers in Ideas, our efforts to attract a more diverse pool of recruits and widen access to the IP professions

We remain of the view that diversity and inclusivity within the IP professions depend strongly on the sector's ability to attract, admit and retain a wider range of recruits. It is important to increase awareness of our professions and improve access, in particular for disadvantaged and currently under-represented groups. We therefore plan to maintain momentum on our careers outreach work, through our Careers in Ideas initiative, and in particular to:

- Complete the 2023 *Summer of IP* campaign⁵, providing activities and events to introduce would-be recruits from a range of backgrounds to IP sector careers, and involving IP sector employers to provide taster sessions, work experience and other similar opportunities
- Establish a Careers in Ideas mailing list to communicate and coordinate the opportunities on offer for both would-be recruits and IP professionals
- Develop a new Careers in Ideas website:

⁵ See <https://ipinclusive.org.uk/careers-in-ideas/summer-of-ip-2023/>

- Improve its structure, functionality and editability
- Use it as a platform for an updated, more accessible and potentially more interactive version of the “careers pathways map”
- Rejuvenate the “opportunities” page (for potential recruits to find open days, work placements, internships etc with inclusive employers)
- Consider a “later-careers” page on second-career opportunities (including in support and administration roles)
- Explore the viability of a pay-to-post version of the opportunities page – possibly including entry-level jobs as well – to generate funds for Careers in Ideas

We will also continue to:

- Maintain the Careers in Ideas Mentoring Hub, recruit new mentors and mentees, and from this generate positive case studies to use in our outreach materials
- Recruit volunteers from a wider range of IP sector roles (including, eg, paralegals, business support staff, solicitors, barristers, in-house IP professionals, searchers and tech transfer professionals) onto the Careers in Ideas task force, and improve representation of these groups on the website and in associated comms
- Develop our network of contacts among relevant external organisations (in particular those focused on socioeconomic mobility, access to the professions and/or groups currently under-represented in the UK’s IP sector), to help us promote the Careers in Ideas resources and opportunities

3 Operational plans

Our operational plans will focus on:

- Supporting our volunteer base, which remains crucial to delivering effectively and efficiently on IP Inclusive’s objectives⁶
- Safeguarding the value and credibility of our EDI Charter scheme as a mechanism for improving EDI standards in the IP professions
- Ensuring good governance and IP Inclusive’s longer-term sustainability

3.1 The executive and management teams

Our executive team – including our Lead Executive Officer – will continue to support the work done by our volunteers under the IP Inclusive banner, with guidance, coordination, administrative and

⁶ To promote and improve equality, diversity, inclusion and wellbeing throughout the UK’s intellectual property (IP) professions (see <https://ipinclusive.org.uk/about/our-mission-statement/> and <https://ipinclusive.org.uk/wp-content/uploads/2021/06/210607-new-ipim-constitution.pdf>)

organisational backup, comms and promotion. IP Inclusive Management (IPIM), primarily through the executive team but also in its oversight role, will continue to guide, support and champion their activities. Our Advisory Board provides valuable guidance for both IPIM and the executive team, and in some instances additional hands-on support.

Having a small team of part-time executive staff worked well in 2022-23, helping us to pursue our objectives with greater vigour and efficiency and also to strengthen our relationships with volunteers, Charter signatories and other stakeholders by providing better support and communications. We will continue (and, funds allowing, expand on) this arrangement. As in 2022-23, we may supplement it with intern support at appropriate times.

We plan to:

- Increase the level of administrative support in our executive team by 50%, to enable us to deliver on the business plan objectives and to assist with stakeholder comms
- Appoint a part-time intern for 4 months, to support the Careers in Ideas website upgrade (see 2.6 above)

The team now generates large amounts of online content for our supporters, both on our websites and on social media, and we would like to optimise its accessibility for disabled and neurodivergent users. We will also therefore:

- Provide basic training in digital accessibility for our executive team members, including the Lead Executive Officer

The Advisory Board was established in 2021 and all its current members recruited at the same time. A phased change is needed as we approach the end of the normal three-year appointment terms, to ensure continuity and a smooth changeover of Board members whilst also maintaining a diverse range of perspectives. During the next two years we therefore plan to:

- Work with the Advisory Board to ensure a rolling programme of new appointments

3.2 Finances

Over the next twelve months we plan to:

- Raise an additional £88,000 to fund our work for the year (see the 2023-24 budget published alongside this plan)
- Replace IPIM's existing bank account, which for historical reasons is administered through CITMA, with an account to which we have direct access

Towards the end of that period we will publish a fresh budget for August 2024 to July 2025, prior to embarking on a further annual fundraising campaign.

3.3 Website and comms

We plan to:

- Review the cost and effectiveness of our website hosting and development arrangements, and make changes where appropriate
- Extend our domain name registrations to include associated email accounts

3.4 Our EDI Charter scheme and associated processes

In order to strengthen our EDI Charter scheme, we plan to:

- Establish a (light-touch) annual process for signatories to reconfirm their Charter commitments, account for and share their EDI activities, contribute to IP Inclusive's plans, and update their contact details
- Use this process to obtain input for the impact assessment referred to at 2.5 above

4 Longer-term objectives

Our Advisory Board, and other stakeholders at our annual meeting, have told us they would like to see IP Inclusive develop longer-term strategies in addition to its operational plans. We are delighted that the initiative has grown in reach and influence – and earned the confidence of its stakeholders – to the extent that this more mature form of planning now feels appropriate.

Over the next two years, therefore, we hope to create for ourselves a longer-term (three- to five-year) strategy, under which our future business plans will be shaped. This strategy will include high-level objectives for developing IP Inclusive, its role in and its value to the IP professions.

As part of this process, we plan to:

- Consult with our Advisory Board, Charter signatories and other stakeholders, through the mechanisms outlined in 2.5 and 3.4 above along with other appropriate meetings and surveys, to identify:
 - Longer-term changes, challenges and opportunities in the IP sector that should help shape IP Inclusive's work over the relevant planning period
 - Wider issues (eg cultural, economic and/or legal) likely to affect the IP sector's approach to EDI during that time
- Look into grants and other sources of funding, and into structural and governance changes (for example conversion to a community interest company or charitable incorporated organisation) that could help us to access them

Annex I: Continuing activities

During the period covered by this business plan we will continue to do the following things.

I.1 Communities and other support networks

- Support and develop the existing communities and networks
- Support the formation of new networks where appropriate (eg for older/retired people, to address EDI issues related to faith and belief, for paralegals and/or business support professionals, or to promote men’s mental wellbeing)
- Provide support for IP professionals going through the menopause or perimenopause and their IP sector allies

I.2 Our EDI Charter

- Organise more of the outreach meetings begun in 1Q 2023, to gain a better understanding of the needs of different types of Charter signatory, improve the support we offer them and increase their engagement with the Charter commitments
- Organise “Pledge Prattle”⁷ discussions for Senior Leaders’ Pledge signatories and their colleagues
- Work with the IP Federation to share best practices between industry and private practice, and to incentivise use of the Charter and Senior Leaders’ Pledge to establish EDI credentials in business partnerships

I.3 Mental wellbeing

- Work alongside Jonathan’s Voice and LawCare to raise awareness of relevant issues and available resources, and to both stimulate and inform conversations on mental wellbeing among IP professionals
- Collaborate with Jonathan’s Voice to provide webinars on relevant topics
- Encourage involvement of our communities and networks in mental health-related activities and events
- Work with Jonathan’s Voice to maintain, and where appropriate upgrade, the mental wellbeing-related content on our website

I.4 Widening our reach

- Increase the diversity of representation (especially of professional role) in the committees of our communities, networks and working groups
- Tailor the support, resources and events we provide for currently under-represented groups
- Consult with representatives of those groups regarding the barriers to engagement and potential solutions
- Focus in particular on IP paralegals, business support professionals, IP solicitors and barristers and (see also II.2 below) in-house IP professionals

⁷ See <https://ipinclusive.org.uk/newsandfeatures/introducing-pledge-prattle/>

- Encourage our Charter signatories and other supporters to act as ambassadors for IP Inclusive and seek their help in reaching those not currently involved with, and/or interested in, EDI issues
- Engage with relevant external organisations, to raise awareness of IP Inclusive among under-represented groups

I.5 General

- Provide educational, knowledge exchange and network-building events; event reports and recordings; guidelines; collations of resources and contacts available elsewhere; and access to support networks and discussion forums for IP Inclusive supporters
- Improve the accessibility of these resources
- Gather EDI-related ideas and best practices from organisations outside the IP sector (with the Advisory Board's help in identifying suitable contacts), and share them with IP Inclusive supporters
- Lobby for, and facilitate, positive change throughout the sector, working where possible with external entities such as membership and representative bodies, IP Offices and regulators to ensure progress on EDI issues

Annex II: “Nice-to-have” extras

The following are things we would like to do, but only if our resources permit. Our approach to these will depend among other things on the level of administrative support we have (see 3.1 above), the funds we are able to raise, and the results of the various consultations and data gathering exercises referred to in sections 2, 3 and 4. That said, we very much hope to provide resources on at least one – and ideally more – of the themes referred to in II.2 below.

II.1 In-person events and networking opportunities

- Encourage supporters to organise their own *ad hoc* IP Inclusive-branded “micro-events” on topics and in locations of interest
- Develop bureaucracy-lite systems to facilitate that

II.2 Other resources

- Provide resources (including events and guidelines) to help improve EDI practices sector-wide, focusing on at least some of the following:
 - Resource-efficient measures for improving EDI within small and medium-sized organisations, in-house IP departments and departments within larger law firms
 - Equality of opportunity in recruitment and selection practices, career development systems and overall corporate structures, for professionals in a range of IP sector roles (including business support) as well as for participants in taster days and other outreach opportunities, and avoidance of diversity “leakage”
 - More inclusive career progression systems to support human “life cycle” issues such as menstruation, fertility, pregnancy, parenting and menopause (and potentially health issues more generally)
 - Inclusivity for IP professionals who are retired, approaching retirement or thinking about changes to their work-life balance later in their careers
- (Working with the IP Federation) provide guidance to help private sector IP professionals meet corporate EDI requirements, and/or a set of basic EDI standards for in-house teams to require of external IP counsel

II.3 Data gathering

- Work with relevant external organisations (eg membership bodies, regulators and the UK IPO) to collate and publicise available EDI benchmarking data from around the UK IP sector
- Consult with Charter signatories and other stakeholders to identify areas where EDI is encountering particular challenges

II.4 Diversifying the upstream pipeline

- If feasible, repeat the 2023 *Summer of IP* campaign (see 2.6 above) on an annual or biennial basis

II.5 Our EDI Charter

- Offer “Pledge Prattle”-like forums (see section 2 in Annex I) for other types of Charter signatory, so as to facilitate the sharing of ideas, experiences and support across the IP Inclusive community.

II.6 Widening our reach

- Work with relevant bodies (including IP Offices) to encourage involvement by those who generate and manage IP outside the legal professions, for example inventors, creators, searchers, tech transfer professionals, and IP management and related service providers
- Work with organisations in other countries to share EDI-related ideas and best practices, and disseminate those of value to our UK supporters
- Consider the feasibility of extending our Charter scheme to non-UK organisations who work with existing UK signatories
- Help overseas IP professionals create their own EDI initiatives based on the IP Inclusive model

II.7 Operational

- With the help of our Advisory Board, create a focus group to review the usability of the IP Inclusive website and recommend potential upgrades